



MTW Solutions /Grants Management System

E-Grants Security User Guide

July 2015 Version 1.1



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MTW SOLUTIONS, LLC

E-Grants Security User Guide

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Revision History

Version	Status	Date	By	Summary of Changes
1.0	Draft	06/19/2015	BS	Draft
1.1	Draft	07/08/2015	BS	Modifications to fit updates to Logon Page
	Final	07/10/2015	BS	

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Introduction

The E=Grants User Logon Page gives access to E-Grants for an LEA through users entering their Email address and assigned password.

The E-Grants User Login Page displays 3 different links available to users.

Forgot Password: The Forgot Password link allows a user to request a password if they no longer can logon because of a forgotten password. When requested, the user will receive an email with a one-time password. Upon entering this password the user will be requested to change their password following these guidelines: Minimum length 6 characters, minimum 1 uppercase letters, and minimum 1 lowercase letters.

New User: The new user link allows a user to request credentials for accessing E-Grants or to establish a new vendor/organization in E-Grants. Requests for new users will first be submitted to the Authorized Representative for the district the user is requesting to be associated with. The Authorized Representative may accept or deny the user request. If accepted the request will be submitted to the OPI Security Administrator who has the final authority to grant or deny access. Requests for new vendors/organizations will be sent directly to the OPI Security Administrator for approval.

Public Access: Public access allows a user to view approved applications without entering a Username/Email and password.

E-Grants System

Montana Office of Public Instruction
Welcome to the E-Grants Management System

ANNOUNCEMENTS

New Security Processes:

1. Please log into E-Grants using your email address, rather than the UserID you have historically used.
2. The system may prompt you to reset your password if you have not had OPI reset your E-Grants password within the past 180 days. Please follow the system prompts to do so.

Please contact Kate Vatter at kvatter@mt.gov with any questions or concerns.

INFORMATION
No notifications found.

TRAINING
No notifications found.

NOTICE OF FUNDING AVAILABILITY
No notifications found.

LOGON

Username/Email

Password [Forgot Password](#)

[New User](#) [Public Access](#)

[LOGON](#)

UPCOMING

July 2015

No events found.



New User Setup

Select the New User Link from the Logon Page

opi.mt.gov E-Grants System OPI Home

Montana Office of Public Instruction
Welcome to the E-Grants Management System

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INFORMATION
No notifications found.

TRAINING
No notifications found.

NOTICE OF FUNDING AVAILABILITY
No notifications found.

LOGON
Username/Email
Password
Forgot Password
LOGON
New User | Public Access

UPCOMING
July 2015
No events found.

Select New User Link

The User will be prompted to enter the Organization Name and Click the Org Search button.

NEW USER

It may take up to 48 hours to complete the setup of New Users / New Vendors.

Step 1: Please enter the Organization name and click Org Search to determine whether your Organization is already registered in the E-Grants system.

Step 2: Select your Organization from the dropdown menu and click LEA Search to select the Authorized Representative for your Organization.

-OR-

Step 2: Select the Add New Organization button to create a new vendor.

ORG SEARCH

ADD NEW ORGANIZATION CLOSE



A drop down list box will appear beneath the organization name search box. This list will display all the organizations that match the search name entered. The user must select the organization name they are requesting credentials for.

NEW USER

It may take up to 48 hours to complete the setup of New Users / New Vendors.

Step 1: Please enter the Organization name and click Org Search to determine whether your Organization is already registered in the E-Grants system.

Step 2: Select your Organization from the dropdown menu and click LEA Search to select the Authorized Representative for your Organization.

-OR-

Step 2: Select the Add New Organization button to create a new vendor.

SELECT AN ORGANIZATION

Harlem Elem

Harlem Elementary School

Harlem 7-8

Harlem H S

Harlem High School

ORG SEARCH

LEA SEARCH

ADD NEW ORGANIZATION

CLOSE

The next step is to select the LEA SEARCH button. The E-Grants system will search and display the authorized representative for the organization selected. The user will select the request button to request credentials.

NEW USER

It may take up to 48 hours to complete the setup of New Users / New Vendors.

Step 1: Please enter the Organization name and click Org Search to determine whether your Organization is already registered in the E-Grants system.

Step 2: Select your Organization from the dropdown menu and click LEA Search to select the Authorized Representative for your Organization.

-OR-

Step 2: Select the Add New Organization button to create a new vendor.

▼

ORG SEARCH

LEA SEARCH

Harlem Elem

The following individual is authorized to add new users for your organization. Your request for credentials will be routed to these individuals. If this individual is not the current authorized representative of your organization, please update the contact information in the [Directory of Montana Schools](#).

Angie Baker

abaker@harlemelem.mt.us

ADD NEW ORGANIZATION

REQUEST

CLOSE



New User Form-AR Found: The form presented for a new user when the authorized represented is found is displayed. New user completes the request by entering their first and last name, email address and selection of role. Roles available are Data Entry, Financial Data Entry, Business Manager and Authorized Representative.

NEW USER REQUEST

Harlem Elem Harlem

First Name

Last Name

Email

Role

None Selected

Data Entry

Financial Data Entry

Business Manager

Authorized Rep

Angie Baker

bakera@harlem-k12.mt.us

New User Form-AR Not Found: If the E-Grants system cannot find the authorized representative for the organization entered, the message displayed informs the user that the Authorized Representative has not been found within the e-Grants system. However, the user may still make a request for credentials.

NEW USER

It may take up to 48 hours to complete the setup of New Users / New Vendors.

In order to confirm if your LEA/CBO is already registered in the GMS, please enter the Organization name and click search.

Abaertern Academy

Unable to find any local security admins with the provided search criteria. If you would like to request a logon to the GMS, click the request button.



The form presented for a user request where the authorized representative is not found is displayed. The new user will be requested to enter their first and last name, email address and selection of role. Roles available are Data Entry, Financial Data Entry, Business Manager and Authorized Representative. In addition, the email address of the authorized representative for their organization will be requested.

NEW USER REQUEST

Abaertern Academy

Abaertern Academy

First Name

Brenda

Last Name

Brown

Email

bbrown@aacademy.mt.us

Role

Data Entry

LSA Contact Email

ddixon@aacademy.mt.us

SUBMIT

CANCEL

Selection of the Submit button will cause the system to perform a crosscheck with Central via a linked server to ascertain whether an email address is available for the Authorized Representative for the organization selected.

Successful New User Request: Successful submission of the user request displays the following message. This verifies that the authorized representative was found in OPI's Central Database and has been notified that a new user request has been submitted for their review. If the Authorized Representative approves the user request, then the request will be forwarded to OPI's Security Administrator for review. If approved, the new user will receive an email notification with their password credentials. If a user is not approved then an email notification to the user informing them that their request has been denied will be sent.

NEW USER REQUEST

The New User Request has been submitted.

CLOSE



Unsuccessful New User Request: If the Authorized Representative is not found in OPI’s Central Database, then the user request will not be processed and the authorized representative for the district must complete the necessary steps to establish themselves in the Central Database.

NEW

NEW USER REQUEST

Abae The New User Request was not successfully submitted. The Authorized Representative that will approve your request does not exist in the OPI Central Database system. An e-mail has been sent to that user notifying them to update their e-mail address.

CLOSE

First

Bren

Last

Brown

Email

bbrown@academy.mt.us

Role

Data Entry

LSA Contact Email

ddixon@academy.mt.us

SUBMIT

CANCEL



New Vendor/Organization Setup

Select the New User Link from the Logon Page

opi.mt.gov E-Grants System OPI Home

Montana Office of Public Instruction
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2. The system may prompt you to reset your password if you have not had OPI reset your E-Grants password within the past 180 days. Please follow the system prompts to do so.
Please contact Kate Vatter at kvatter@mt.gov with any questions or concerns.

LOGON
Username/Email
Password
Forgot Password
LOGON
New User | Public Access

INFORMATION
No notifications found.

TRAINING
No notifications found.

UPCOMING
July 2015
No events found.

NOTICE OF FUNDING AVAILABILITY
No notifications found.

Select the Add New Organization button.

NEW USER

It may take up to 48 hours to complete the setup of New Users / New Vendors.

Step 1: Please enter the Organization name and click Org Search to determine whether your Organization is already registered in the E-Grants system.

Step 2: Select your Organization from the dropdown menu and click LEA Search to select the Authorized Representative for your Organization.

-OR-

Step 2: Select the Add New Organization button to create a new vendor.

ADD NEW ORGANIZATION ORG SEARCH CLOSE



The New Vendor Request Form will display. The fields on the left should be completed for the new organization (organization name, address, street address, city, state, zip code, phone number and website). The fields on the right should be completed for the Authorized Representative of the district (first name, last name, email and role) along with designating the authorized representative role. A completed IRS W-9 form must be uploaded using the Browse W-9 button. In addition, a link to the OPI new Vendor Form is provided by selecting the highlighted 'new Vendor Form'. A completed new vendor form is uploaded by selecting the Browse VEN button. If an incorrect form is uploaded, simply browse and select the correct form and it will replace the form previously uploaded. When the new vendor request is correctly completed select the submit button.

NEW VENDOR REQUEST

Prior to processing a new vendor request an [IRS W-9](#) form needs to be completed and uploaded to the EGrants. A link to the form can be found [here](#).

Prior to processing a new vendor request a [new Vendor Form](#) document also needs to be completed and uploaded to the EGrants.

[BROWSE W-9](#)
[BROWSE VEN](#)

<p>Organization Name <input type="text"/></p> <p>Address <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> State <input type="text"/> Zip <input type="text"/> County No.</p> <p>Phone <input type="text"/></p> <p>Website <input type="text"/></p>	<p>First Name <input type="text"/></p> <p>Last Name <input type="text"/></p> <p>Email <input type="text"/></p> <p>Role <input type="text" value="Authorized Rep"/> </p>
--	--

[SUBMIT](#) [CANCEL](#)

When the new vendor request is correctly completed select the submit button. A verification pop up will appear informing the user that their request has been submitted. The OPI Security Officer must approve the request. If approved the new organization will be added to E-Grants and the Authorized Representative submitted in the request will be sent an email informing him/her that her request has been approved and providing them with their password. At that time other user requests for access to E-Grants can be submitted.

NEW VENDOR REQUEST

The New Vendor Request has been submitted.

[CLOSE](#)



Forgot Password

If a user forgets their password and is unable to login, the user simply enters their email address and selects the 'Forgot Password' link.

The system will then display a message informing the user that an email has been sent with a one-time logon temporary password. When the user enters this password, they will be prompted to change their password. Note the password requirements when setting up your new password.

PASSWORD EXPIRED - PLEASE CHANGE

Old Password

New Password

Confirm New Password

Password Requirements

- A password must have a minimum length of 6 characters.
- A password must have a minimum of 1 lower case letters.
- A password must have a minimum of 1 upper case letters.
- A password must have a minimum of 1 numeric characters.



Authorized Representative review of user requests:

When a user successfully submits a request for access to E-Grants, the authorized representative for the district will receive an email informing them of the request. To review user requests the Authorized Representative will logon to E-Grants.

At the Menu List Page, the authorized representative will find and select under the GMS Administration heading the Access Request To Do List.

GMS Administration Access Request To Do List

If the authorized representative is associated with multiple organizations, they will need to select the correct Organization from the drop down list to display the user request.



When the user request is displayed in the table double click on the request to select.

The screenshot shows the 'E-Grants System' interface. At the top, there's a header with the OPI logo and 'E-Grants System' text. Below this is a blue bar with 'GMS Access Requests' and a dropdown menu for 'Organization: Harlem Elem'. A table titled 'USER REQUESTS' is displayed with the following data:

Name	Date Submitted	Status	Status Date
New User Request for 47-Harlem Elem Ann Test	June 23, 2015	SubmittedToLocal	June 23, 2015

The selected User Request will be displayed. Under the new user request heading the role requested by the new user is displayed (see text highlighted). Business roles available to the LEA staff are displayed on the left hand side. By clicking **assign** next to one (or more) of these roles, the user is associated with that organization and moved into that Business Role for the organization. These changes are applied when the reviewer clicks Accept.

The Reject action triggers a notification to the requestors email that their request has been reviewed and denied. An Accept action triggers a notification to the OPI Security Administrator that a user request is ready to be reviewed. Final acceptance by the OPI Security Administrator is needed before a new user is established in the system.

The screenshot shows the 'NEW USER REQUEST' form. It contains the following information:

- Harlem Elem - Harlem Elem**
- Ann Test**
- testa@harlem-k12.mt.us**
- Data Entry role requested** (highlighted in yellow)
- LSA Email**

Below this information are two columns of business roles:

AVAILABLE BUSINESS ROLES	BUSINESS ROLES TO ASSIGN
LEA Auth Rep LEA Authorized Rep assign	
LEA Business Mgr LEA Business Manager assign	
LEA Data Entry LEA Data Entry assign	

At the bottom right, there are three buttons: **ACCEPT**, **REJECT**, and **CLOSE**.